

PROCUREMENT BID PACKAGE CHECKLIST

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Procurement No. _____

Use existing, computerized packages completed for other procurements. Add/delete paragraphs as appropriate relative to the subject of the bid. Requirements for the bid package are listed in the order they should appear. **Sub-recipient** requirements are marked with an asterisk.

In general, maintain a "need to know" approach. While a history of the program may be interesting, it is of little relevance to prospective bidders.

Cover letter stating:

- The Company as the procurer.
- The bid as a **Request for Bid, Request for Proposal or Invitation to Bid**.
- The subject of the Request/Invitation.
- When bids are due.
- Pre-bid conference date, time, and address. While not required, this conference can uncover problems with the bid in time to rectify them before bids are due.
- Disclaimer that the Company has the right to cancel the RFP.
- Disclaimer that funding can affect length of contract.
- That procurement is in compliance with Federal and State procurement regulations.
- That small, minority, and women's businesses are encouraged to apply.
- Date proposal issued.

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Timeframe Outline with dates for:

- Issuing RFB/RFP/IFB.
- Prebid conference including time and location.
- Bid submittal deadline.
- Interviews, if needed.
- Pre-award survey of facilities, if needed.
- Evaluation period, if needed.
- Date and time for bid opening if no evaluation contemplated.
- RVPIC review.
- Contract award (Board Meeting).
- Contract negotiation period, if needed.
- Contract signing.
- Notification of unsuccessful bidders.
- Contract start.

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Instructions to Bidders with:

- Brief description of the Company and Job Training Partnership Act.
- Sources, funding levels, and timeframes for funding including cancellation if funding does not materialize and potentially cyclical nature of contracts.
- Type of contract/sub-agreement contemplated (cost-reimbursement, fixed price, etc.)
- Classification of bidders as vendors or sub-recipients.
- Number of copies of proposal required.
- Name and address for sending proposals.
- Name, address, and telephone number of staff person designated as contact.
- Definition of negotiation. During negotiations, confidentiality shall be maintained; contents of proposals will not be revealed to another bidder or to the public.
- Confidentiality of proposal, i.e. no public access to bids until contract is awarded. Only information concerning the winning proposal is ever divulged publicly.
- Evaluation process and how it determines award of contract.
- Bidders to be aware of and comply with JTPA regulations, rules or laws, if applicable.
- Statement requiring bidder's availability to demonstrate item or to allow the Company to inspect the bidder's organization or to review recent audit.
- Possible on-site inspection (pre-award survey).
- Materials and/or equipment Contractor will need to provide services.
- The criteria to be met for receiving payments on the contract, particularly JTPA fiscal provisions for Performance Based or for Cost-Reimbursement Contracts.

General Assurances.

- See **SAMPLE RFQ, General Assurances**, and include those paragraphs appropriate to the procurement and appropriate to the type of bidder, i.e. vendor or sub-recipient.
- If deemed necessary, a Definitions Section explaining terms used in the bid.
- If achieving Program Goals and Objectives is a major concern:
 - Previous SDA-sponsored training programs.
 - Funding program, i.e. Youth, Disabled, etc.
 - Overall program objectives.
 - Purpose of this contract.
 - Targeted groups.
 - Service Population including age and criteria for inclusion in the program.
 - Participants and how they are selected and enrolled.
 - Number of Participants expected in the program and, if in groups, the timeframes for each referral of each group to the provider.

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Services to be provided by the Company.

- Participant selection and enrollment services, if any.
- Project coordination (meetings) between the Company and contractor, if any.
- Provision of materials and/or equipment Contractor will need to provide services.

Bidder Information Packet: (See Appendix B for forms.)

- Bid Proposal Form** with assurances/certifications required on all contracts.
- Statement of Bidder's Qualifications.**
- Insurance Certifications.**

Specifications Section

See **SPECIFYING DELIVERABLES CHECKLIST** and **EVALUATION RATING WORKSHEET** for requirements. Specifying deliverables includes defining the criteria for evaluating proposals.

Bid Sheets

With fill-in blanks related to each requirement in the **Specifications** section.

Exhibits

- Detailed training curriculum.
- Forms and procedures.
- Budget Line-Item Requirements (See **BUDGET LINE-ITEMS CHECKLIST.**)
- Accessibility Self-Evaluation Forms.